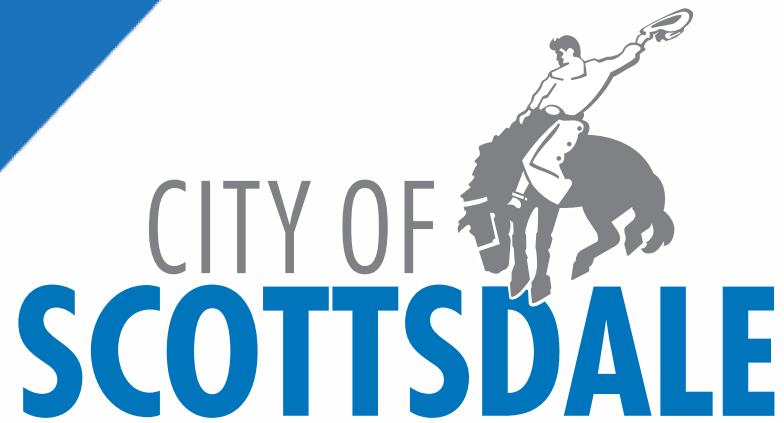




## 2018 Visitor Research

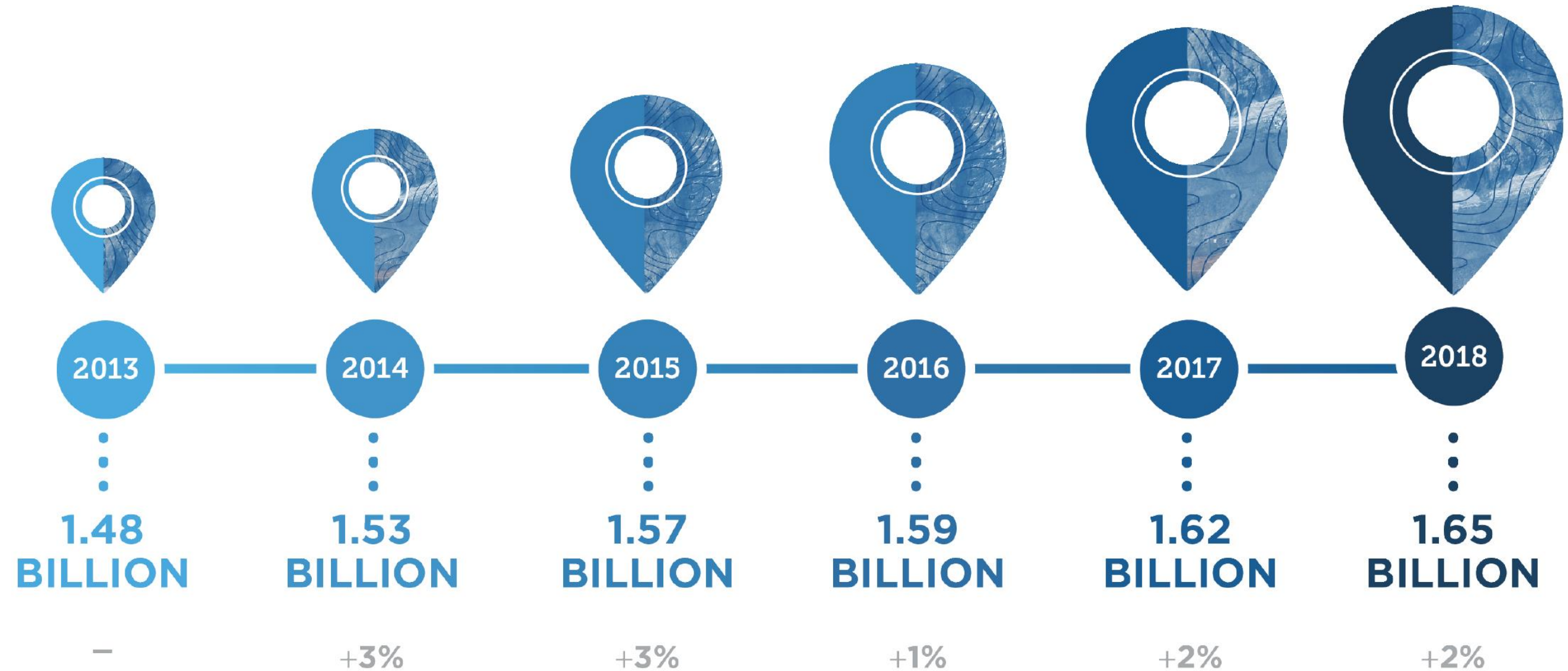


Prepared for Scottsdale

- First conducted in 1990, Longwoods Travel USA is the largest ongoing survey of American travelers.
- Quarterly survey asking respondents about leisure and business trips they took during the past 3 months
- In 2018, over 325,000 trips in database
- There are 1,101 overnight and day trips to Scottsdale in the 2018 database



# **Longwoods Travel USA<sup>®</sup>:** U.S. Travel Market & Trends



## Domestic Trips and Growth by Year

**2013**  
\$404.1  
BILLION

**2014**  
\$425.6  
BILLION  
+5%

**2015**  
\$446.4  
BILLION  
+5%

**2016**  
\$444.9  
BILLION  
0%

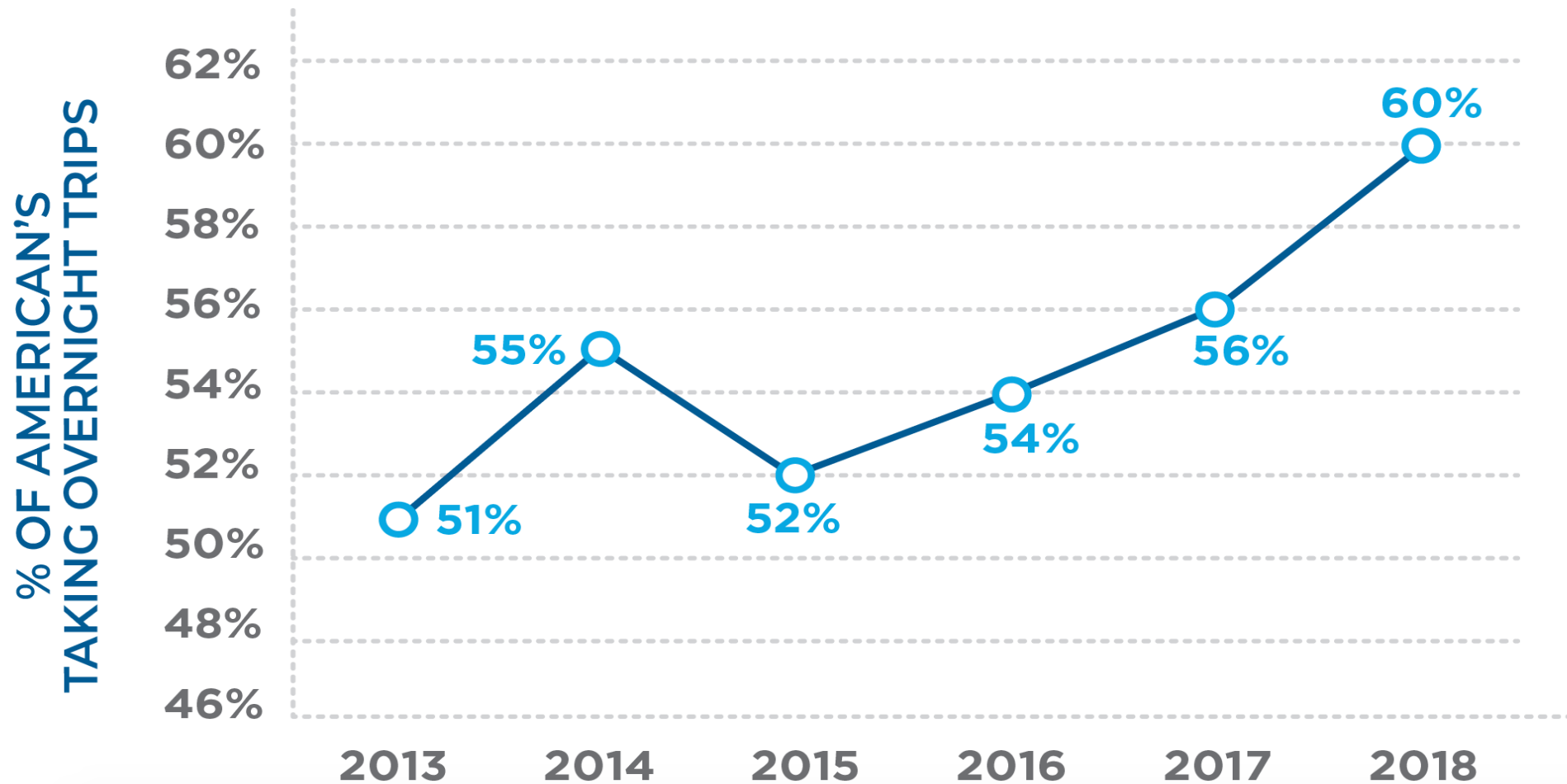
**2017**  
\$451.6  
BILLION  
+2%

**2018**  
\$465.7  
BILLION  
+3%

# American Travel Spending

2018 Longwoods Travel USA®

# More Americans Traveling





# Visitor Research: 2018 Volumes & Expenditures



# Size and Structure of Scottsdale's Domestic Travel Market

## Total Size of Scottsdale 2018 Domestic Travel Market

Total Person-Trips

**9.1 Million**

+2.5% vs. last year



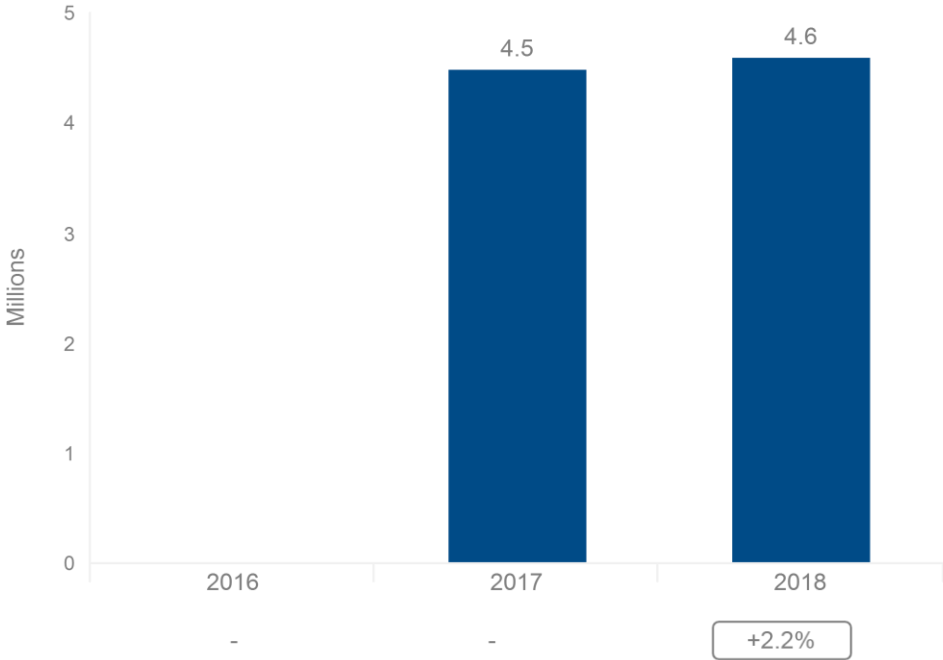
■ Day  
49% | 4.4 Million

■ Overnight  
51% | 4.6 Million

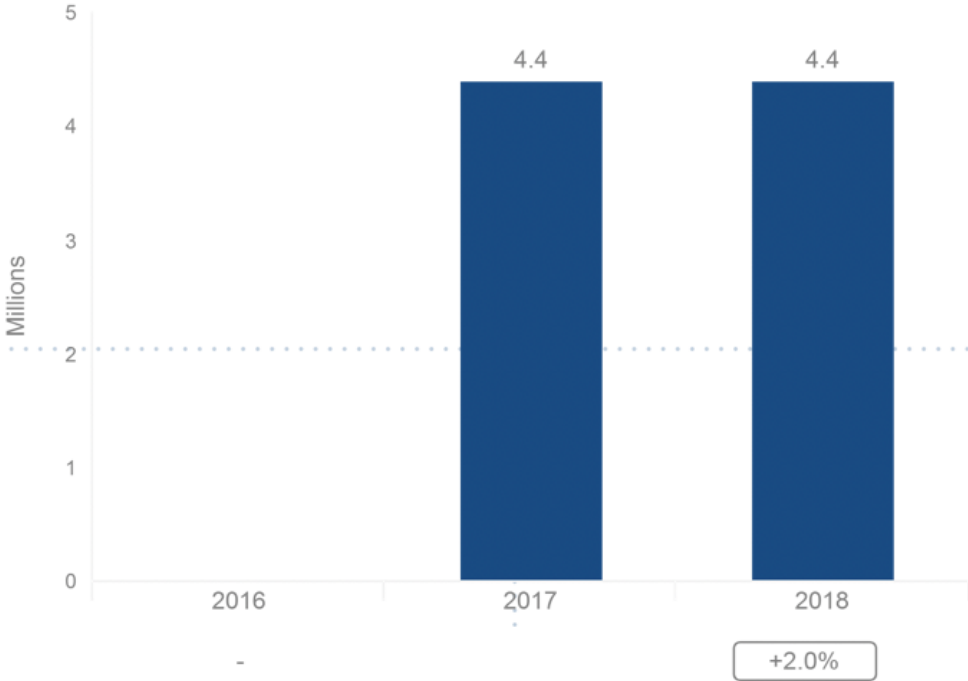
# Size and Structure of Scottsdale's Domestic Travel Market

Base: 2018 Overnight Person-Trips

### Overnight Trips to Scottsdale



### Day Trips to Scottsdale



# Scottsdale Domestic Overnight Expenditures

## Domestic Overnight Expenditures - by Sector

Total Spending

**\$ 1.344 Billion**

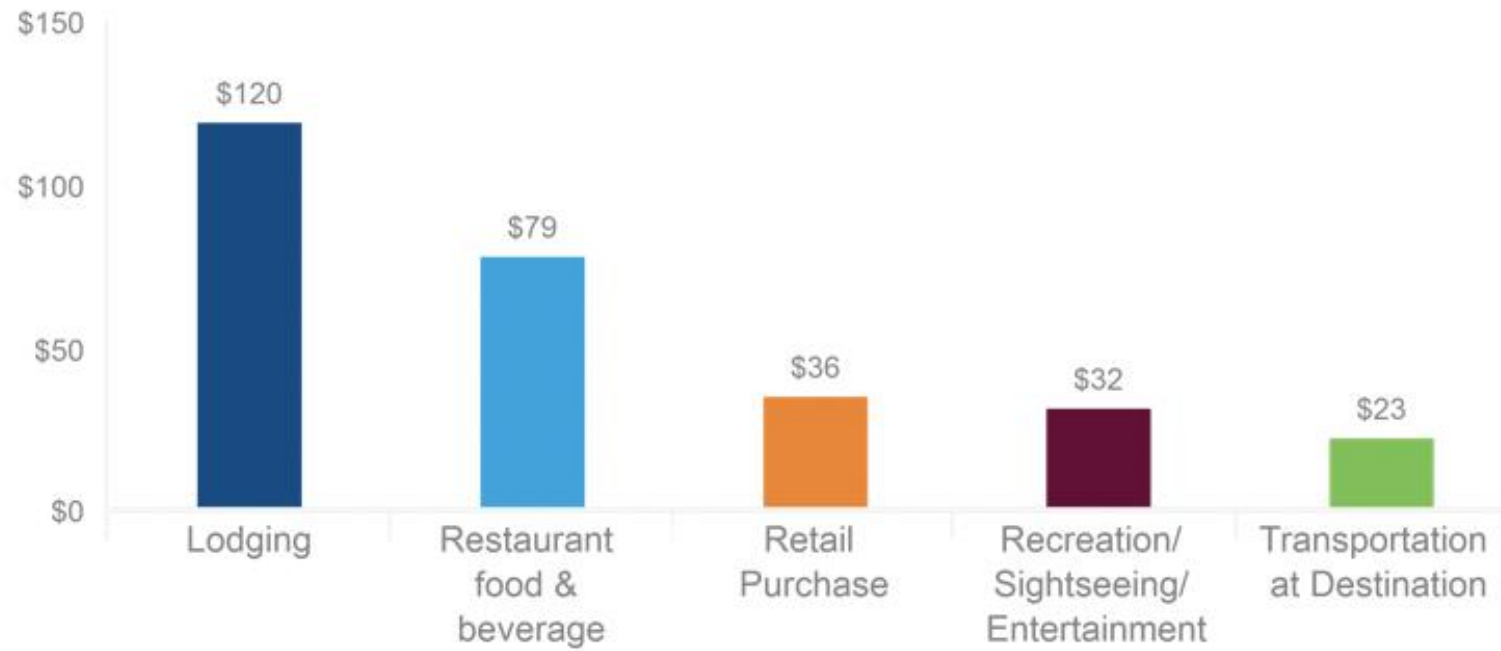
+6.4% vs. last year



- Lodging  
41% | **\$557 Million**
- Transportation at Destination  
8% | **\$105 Million**
- Restaurant Food & Beverage  
27% | **\$367 Million**
- Retail Purchase  
12% | **\$165 Million**
- Recreation/Entertainment  
11% | **\$149 Million**

# Scottsdale Domestic Overnight Expenditures

**Average Per Person Expenditures on Domestic Overnight Trips - by Sector**



# Scottsdale Domestic Day Expenditures

## Domestic Day Expenditures - by Sector

Total Spending

**\$ 0.314 Billion**

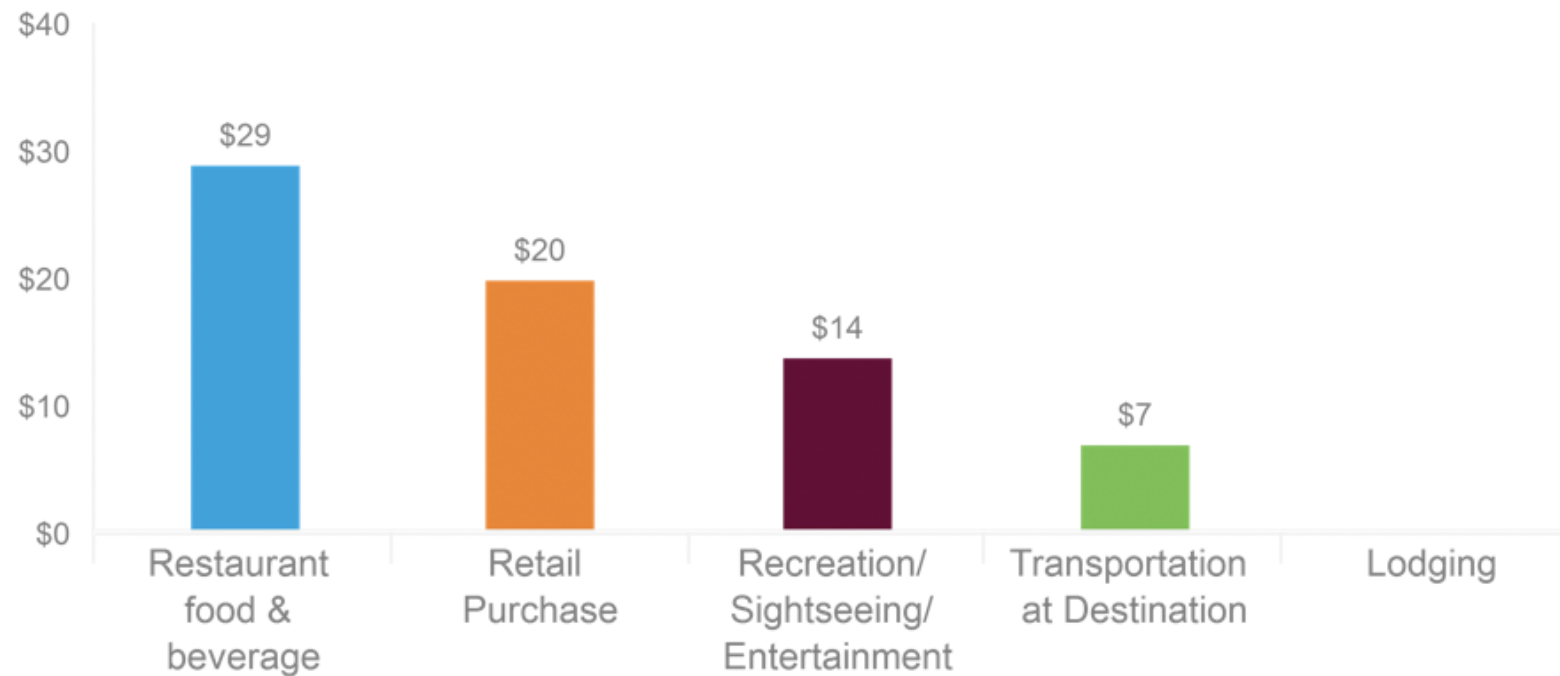
+5.4% vs. last year



- Lodging  
- | \$-
- Transportation at Destination  
10% | \$32 Million
- Restaurant Food & Beverage  
41% | \$130 Million
- Retail Purchase  
29% | \$91 Million
- Recreation/Entertainment  
20% | \$62 Million

# Scottsdale Domestic Day Expenditures

**Average Per Person Expenditures on Domestic Day Trips - by Sector**

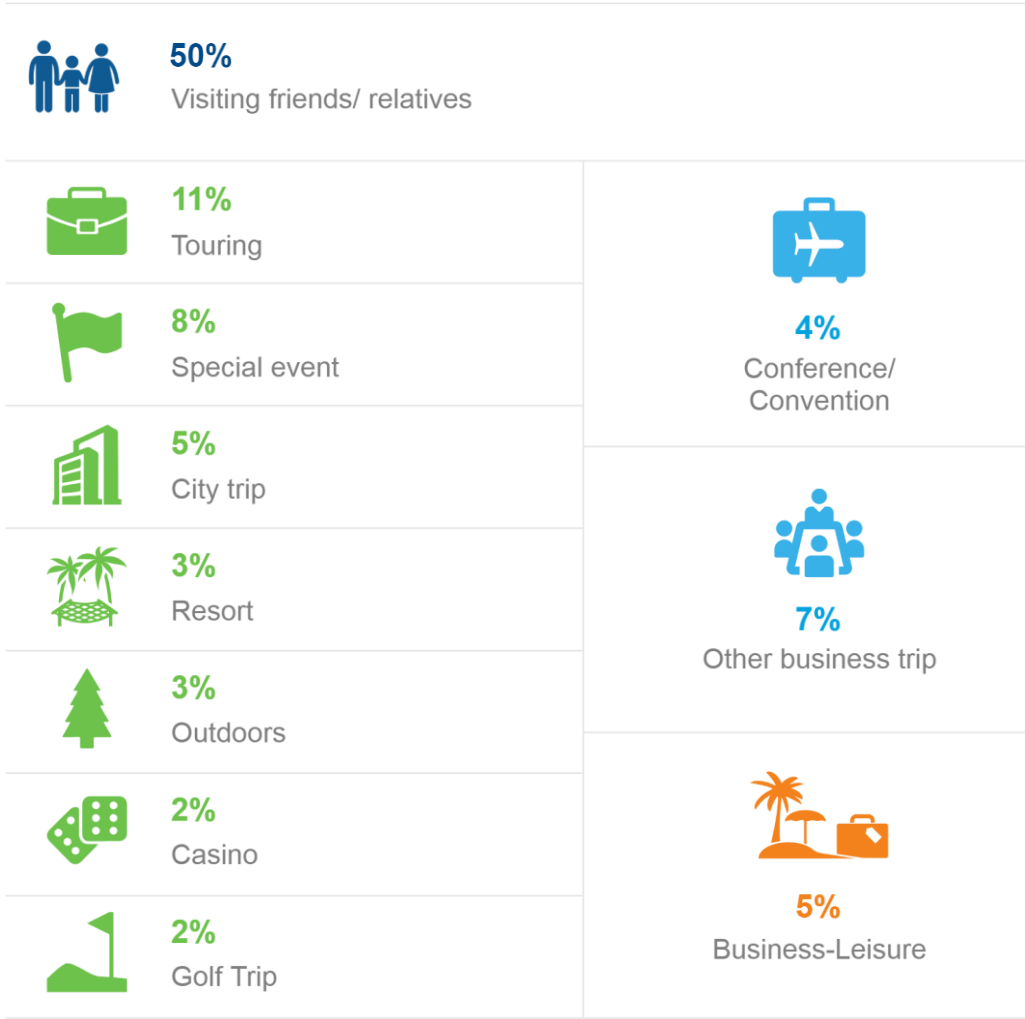




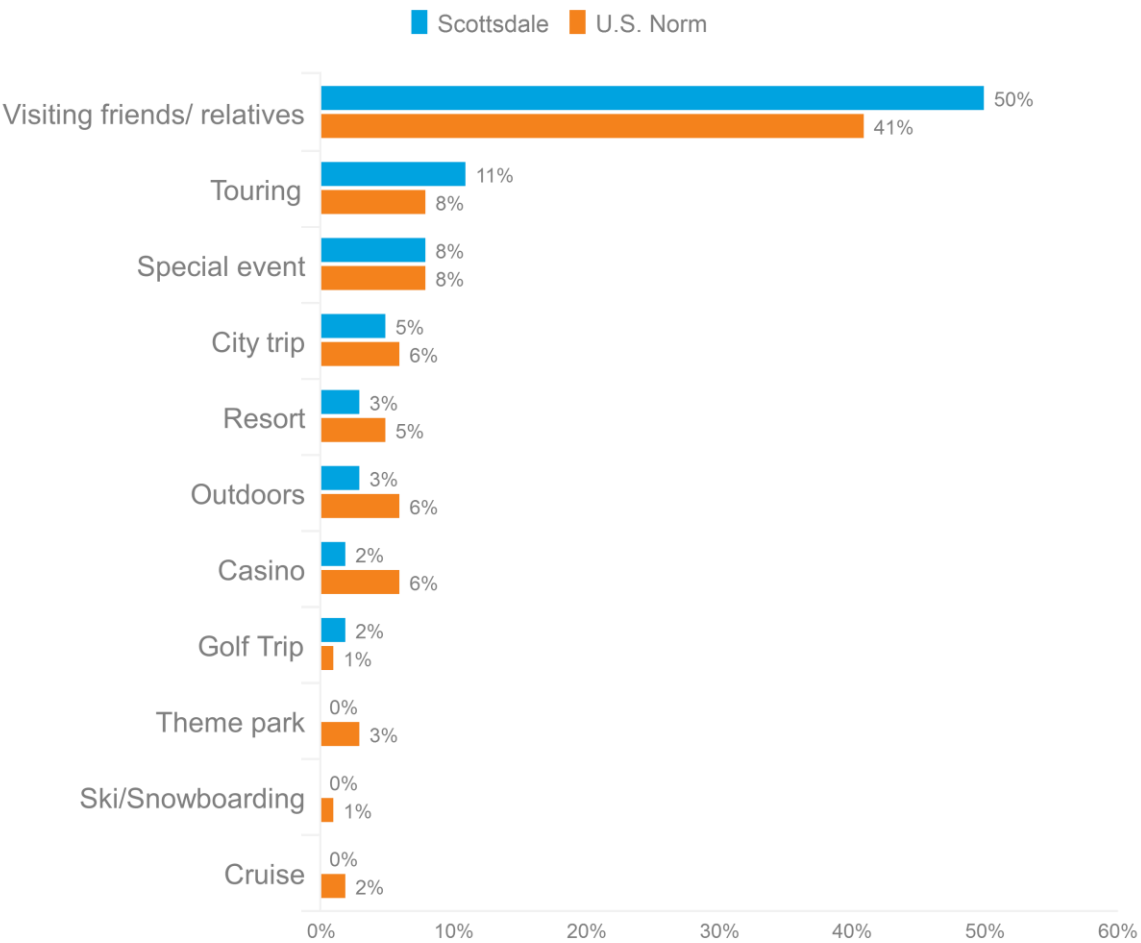
# Visitor Research 2018 Overnight Visitation



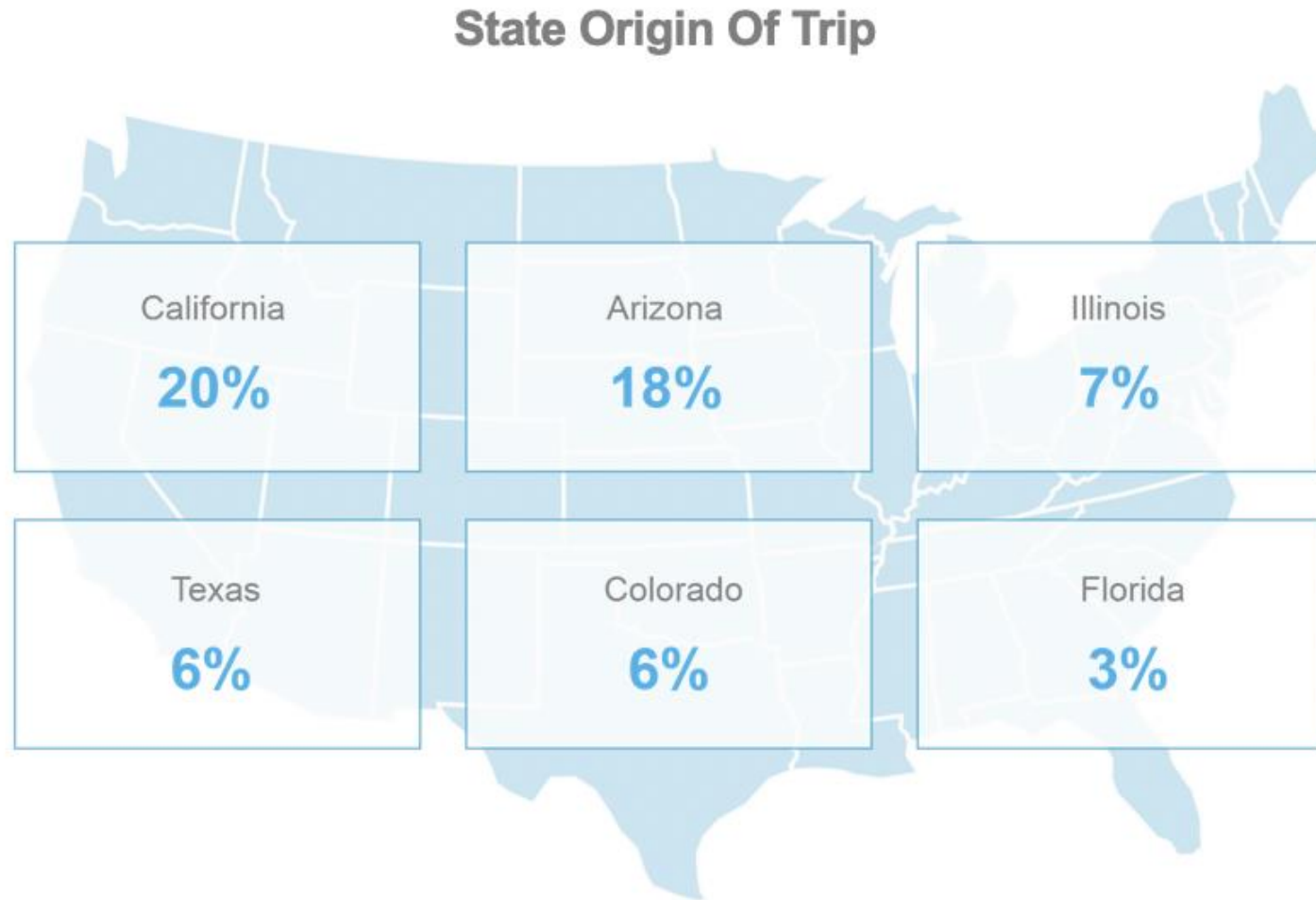
Main Purpose of Trip



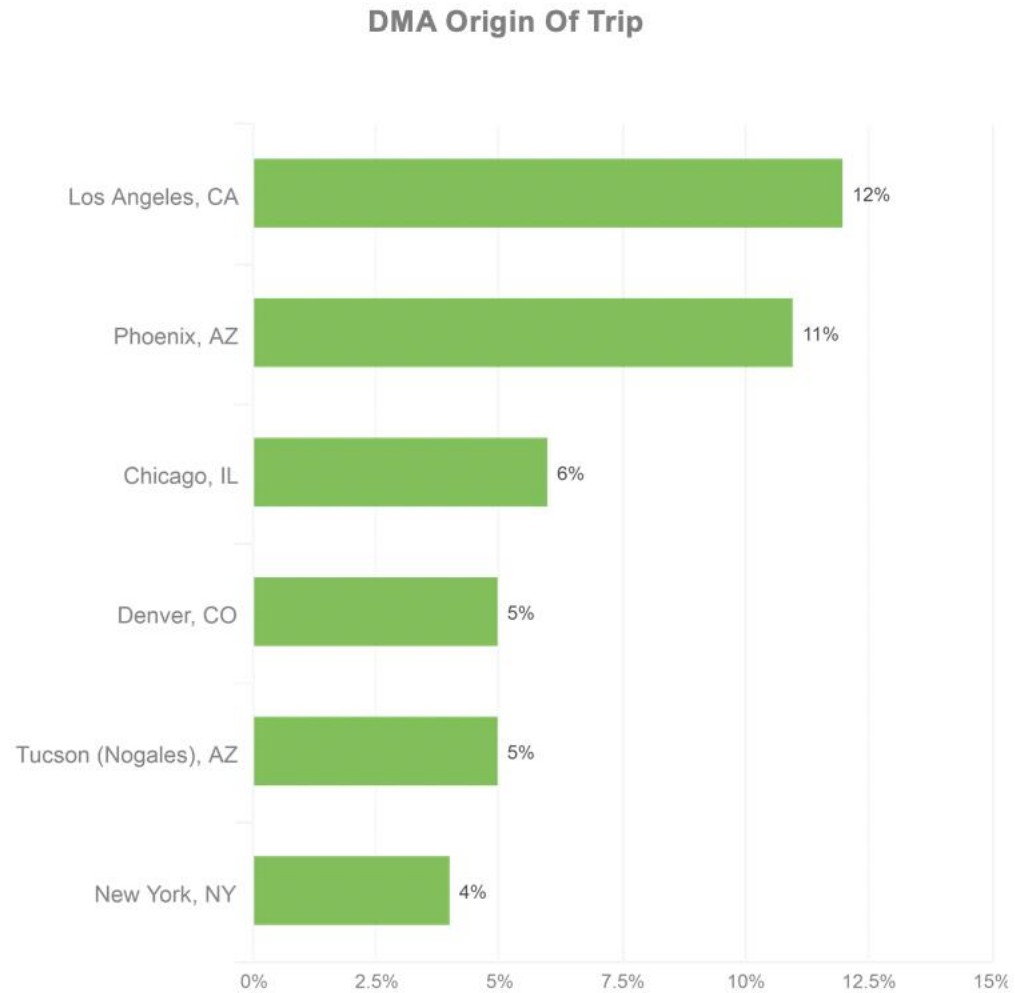
Main Purpose of Leisure Trip



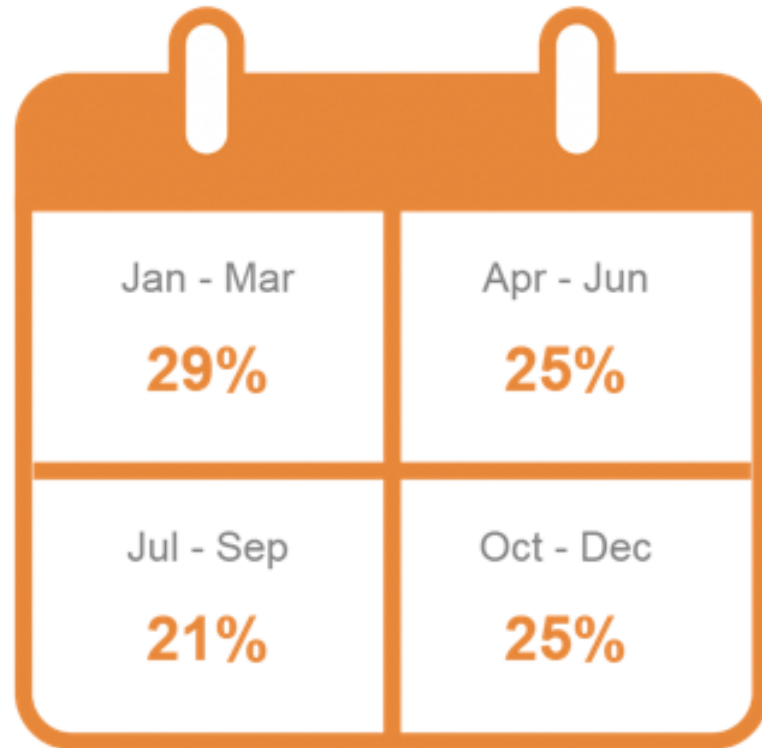
# Scottsdale's Overnight Trip Characteristics



# Scottsdale's Overnight Trip Characteristics



# Scottsdale's Overnight Trip Characteristics



**Season of Trip**

Length of Trip Planning

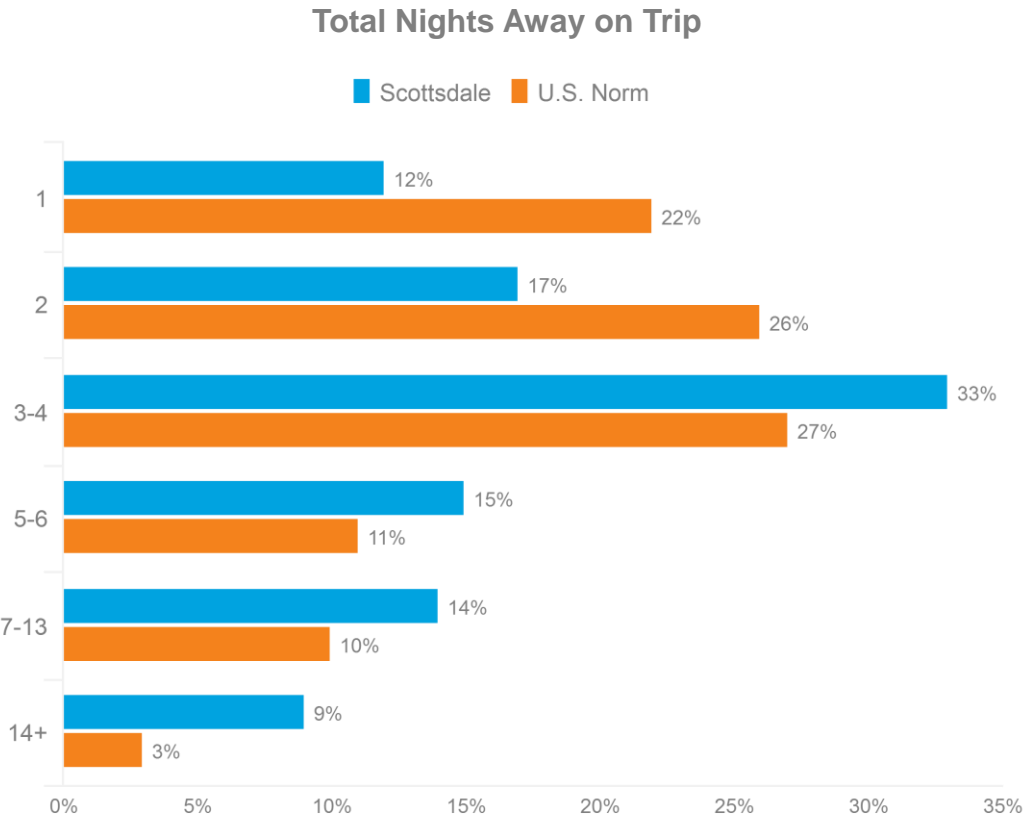
Average   Scottsdale: 89 days   U.S. Norm: 88 days



Scottsdale		
■	More than 1 year in advance	2%
■	6-12 months	17%
■	3-5 months	21%
■	2 months	19%
■	1 month or less	30%
■	Did not plan anything in advance	12%

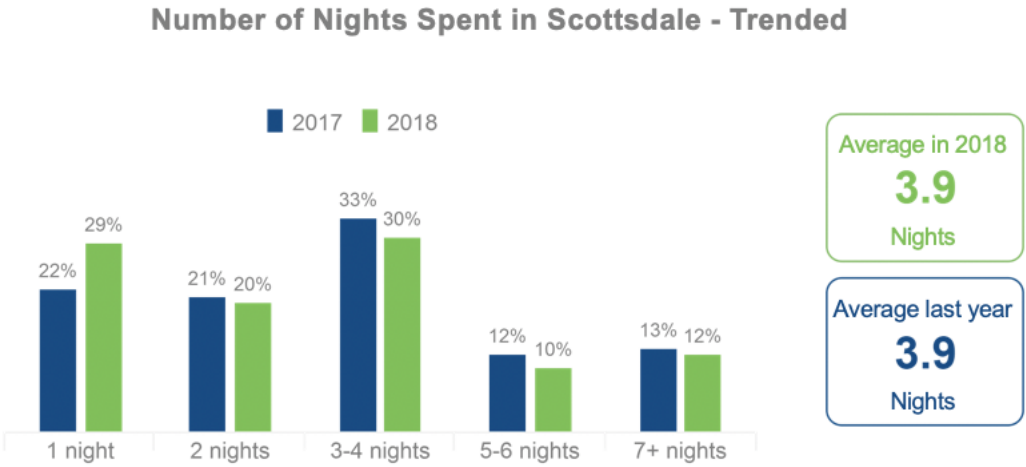


U.S. Norm		
■	More than 1 year in advance	4%
■	6-12 months	14%
■	3-5 months	17%
■	2 months	16%
■	1 month or less	33%
■	Did not plan anything in advance	14%



Scottsdale  
**5.6**  
Average Nights

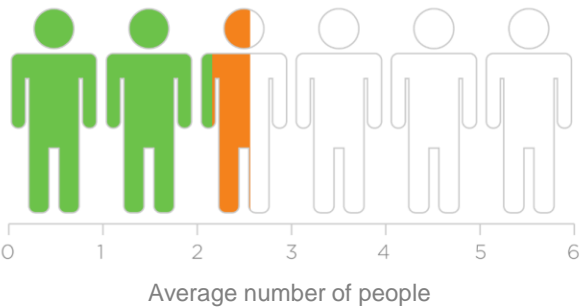
U.S. Norm  
**3.8**  
Average Nights



## Size of Travel Party

Adults Children

Scottsdale

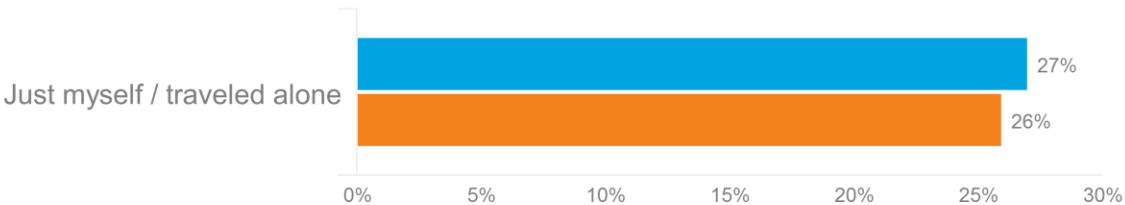


U.S. Norm



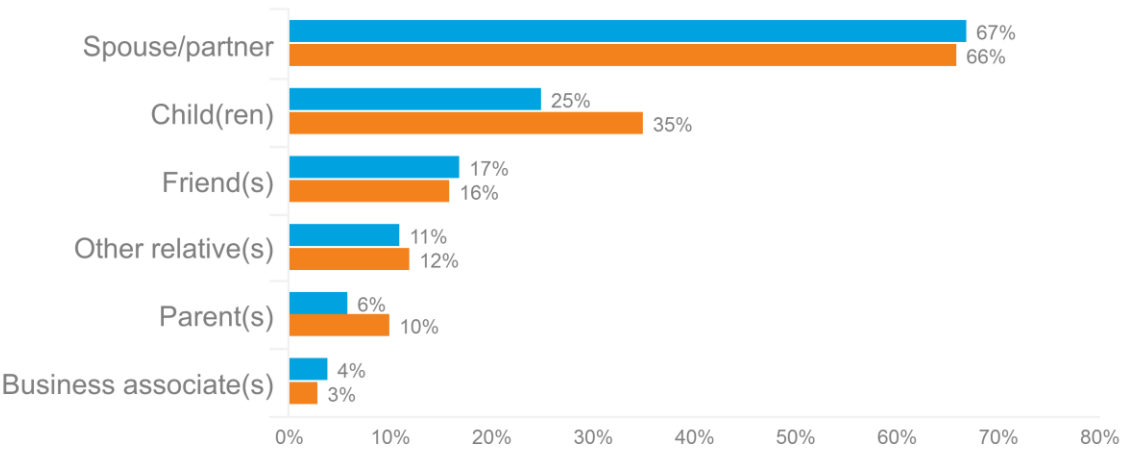
## Percent Who Traveled Alone

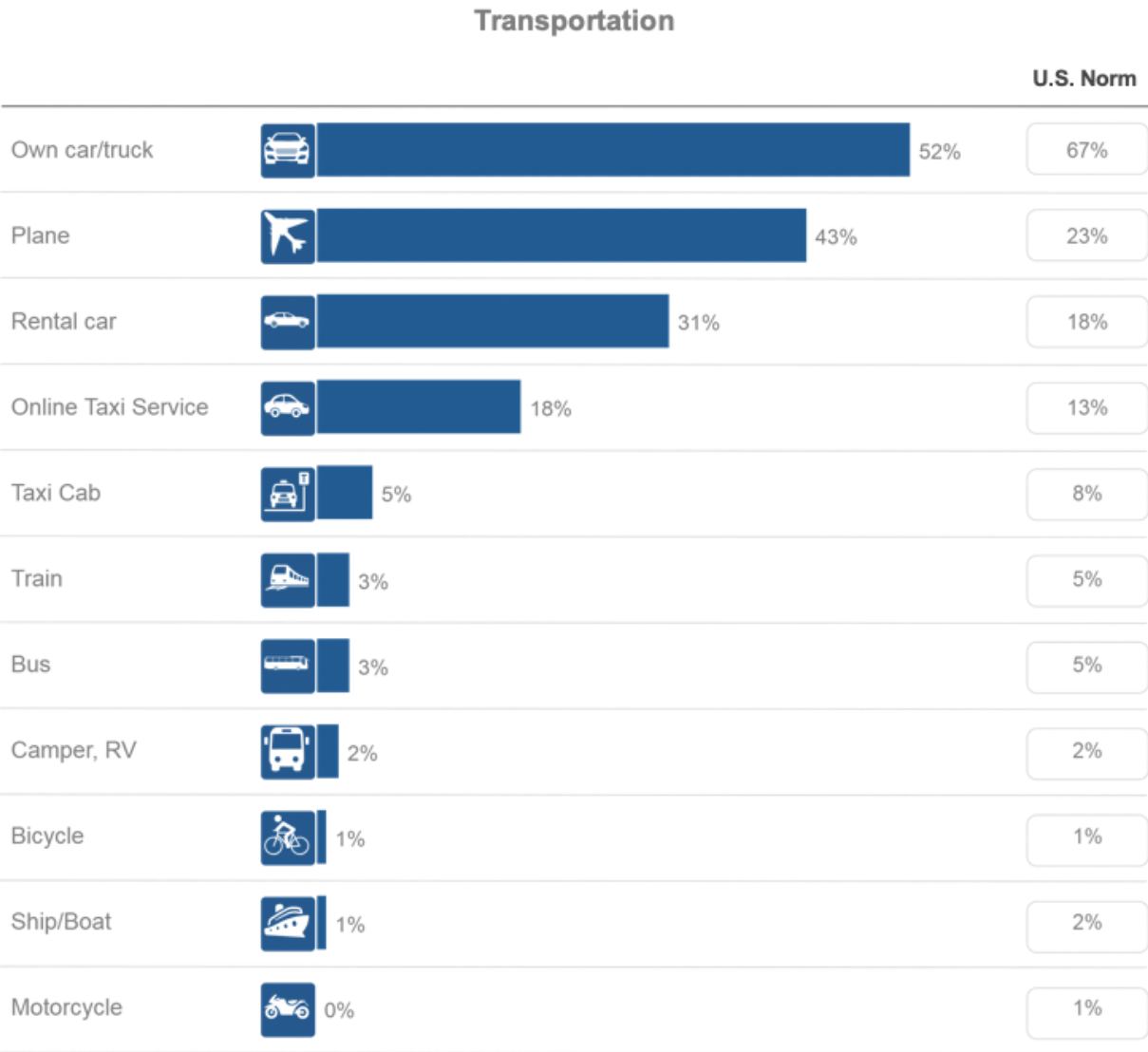
Scottsdale U.S. Norm










## Composition of Immediate Travel Party

Scottsdale U.S. Norm





Accommodations			
		Scottsdale	U.S. Norm
	Resort hotel	29%	24%
	Home of friends or relatives	29%	24%
	Other hotel	21%	22%
	Motel	10%	16%
	Bed & breakfast	8%	4%
	Rented home / condo / apartment	7%	5%
	Time share	6%	3%

# Activities and Experiences (Top 10)

Shopping



**40%**

U.S. Norm  
30%

Fine/upscale dining



**25%**

U.S. Norm  
12%

Bar/nightclub



**22%**

U.S. Norm  
15%

Landmark/historic site



**18%**

U.S. Norm  
12%

Swimming



**17%**

U.S. Norm  
14%

National/state park



**17%**

U.S. Norm  
10%

Museum



**16%**

U.S. Norm  
10%

Casino



**13%**

U.S. Norm  
12%

Hiking/backpacking



**13%**

U.S. Norm  
7%

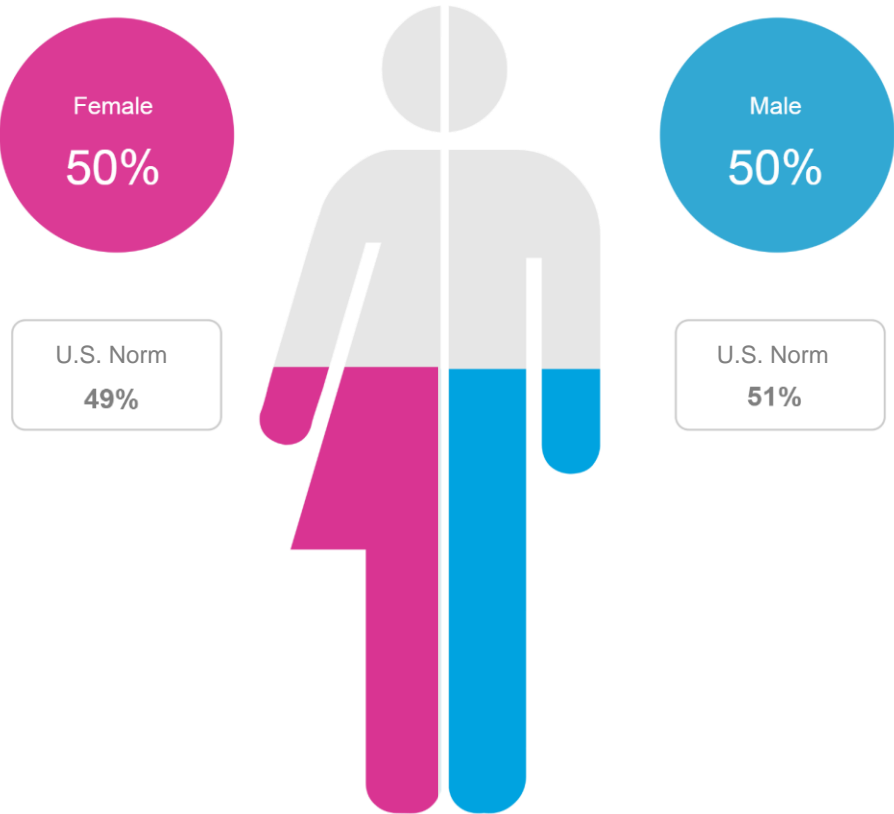
Golf



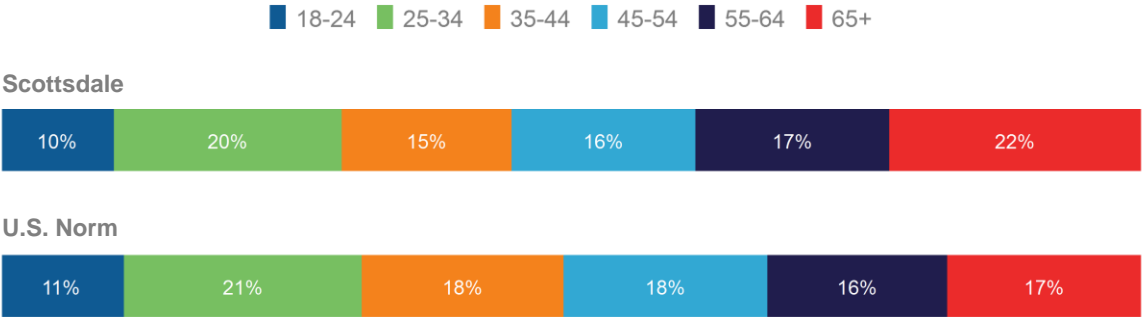
**11%**

U.S. Norm  
4%

## Gender

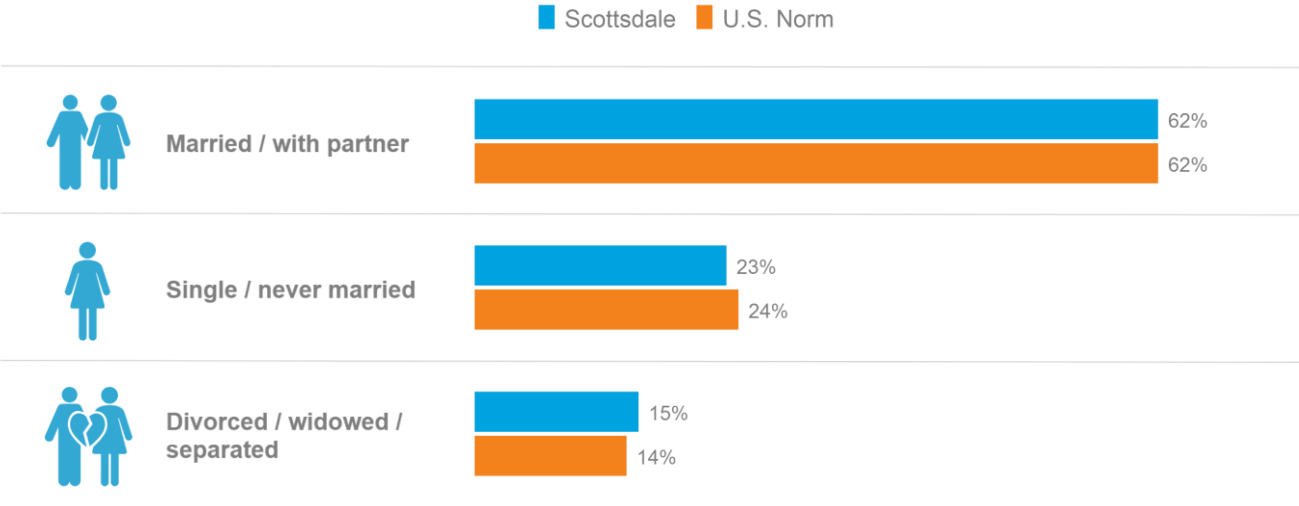


## Age

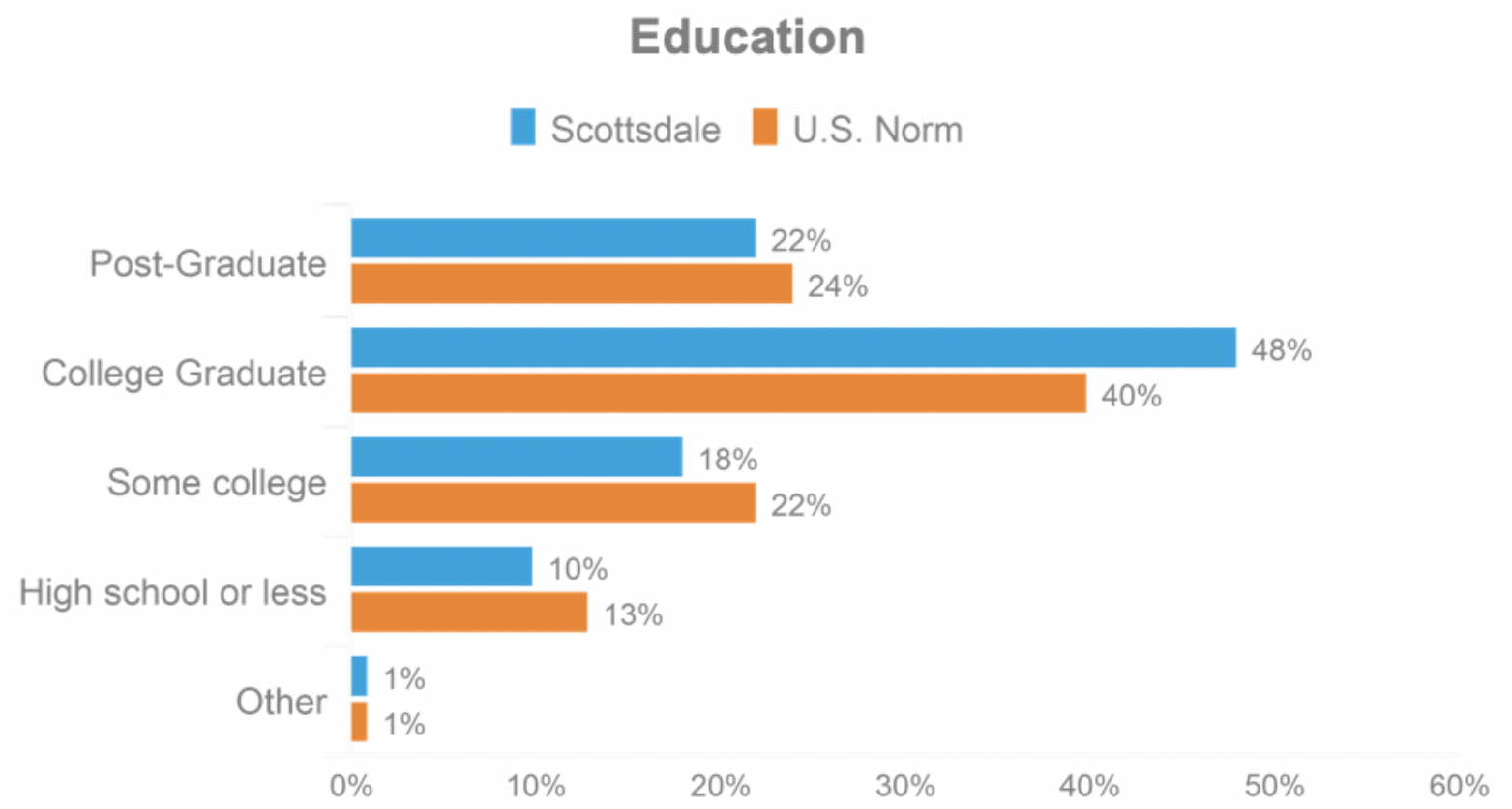


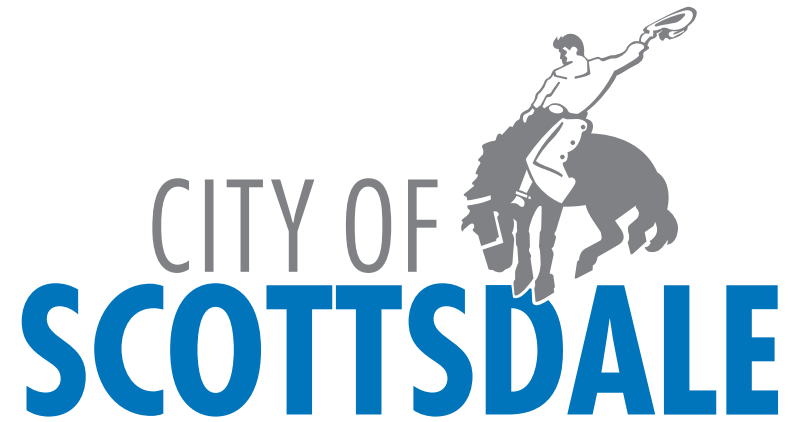
Average Scottsdale: 48.0. U.S. Norm: 46.1

## Marital Status





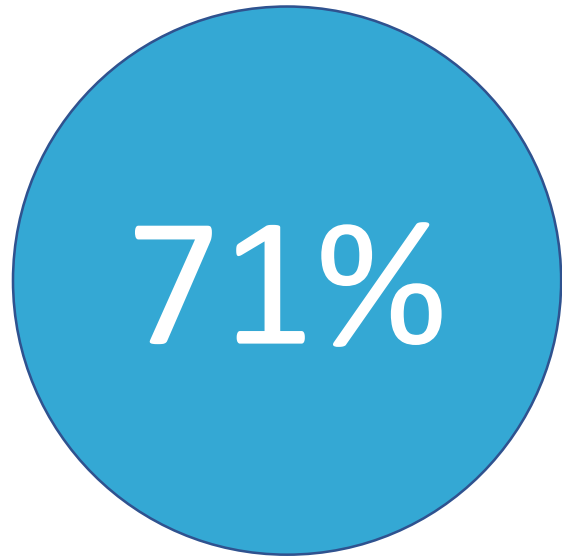




## RTS Overnight Trip Characteristics



# Impressions of Scottsdale as a Travel Destination



“A place I’d really enjoy visiting”

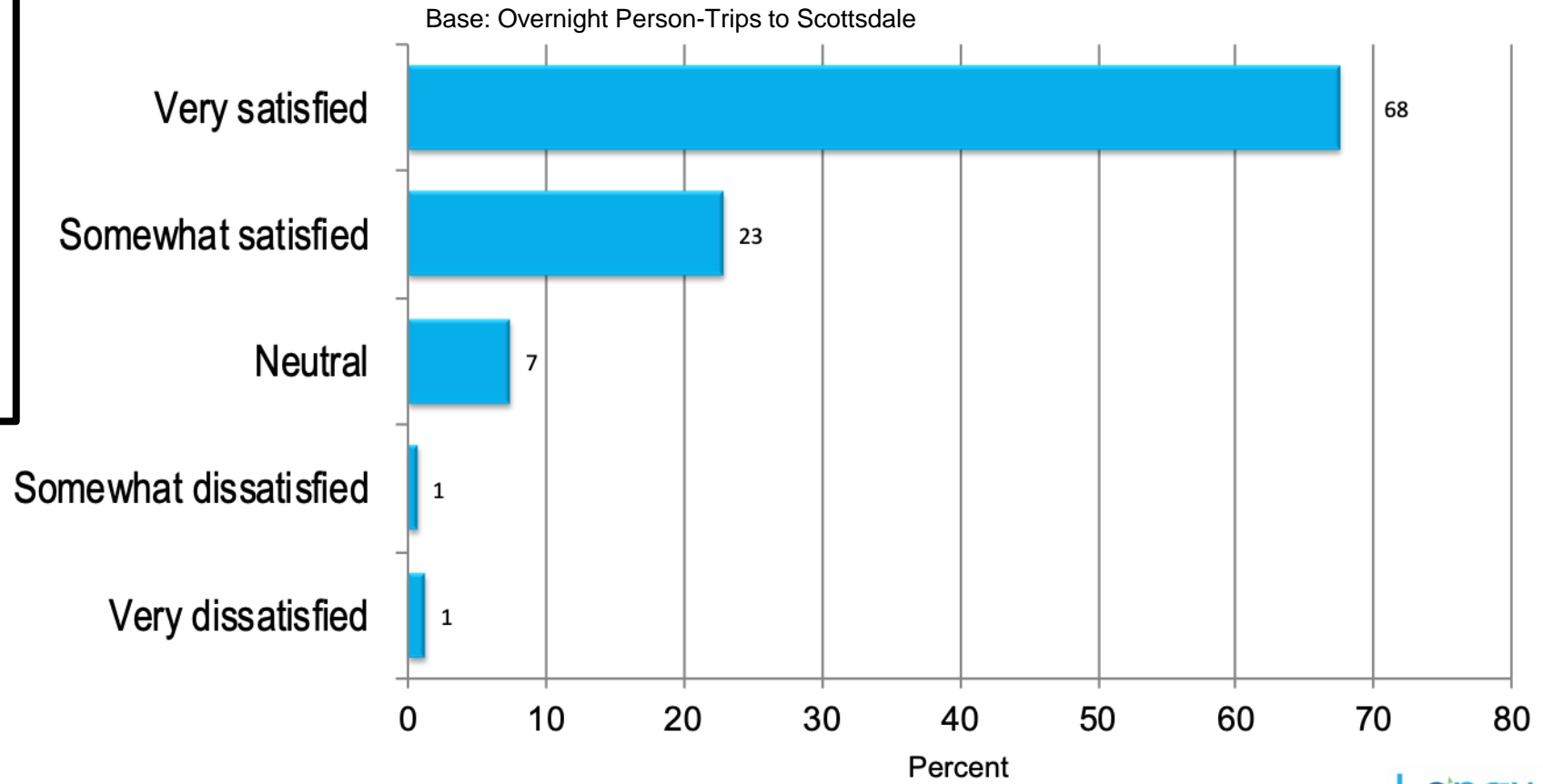
# Future Visitation



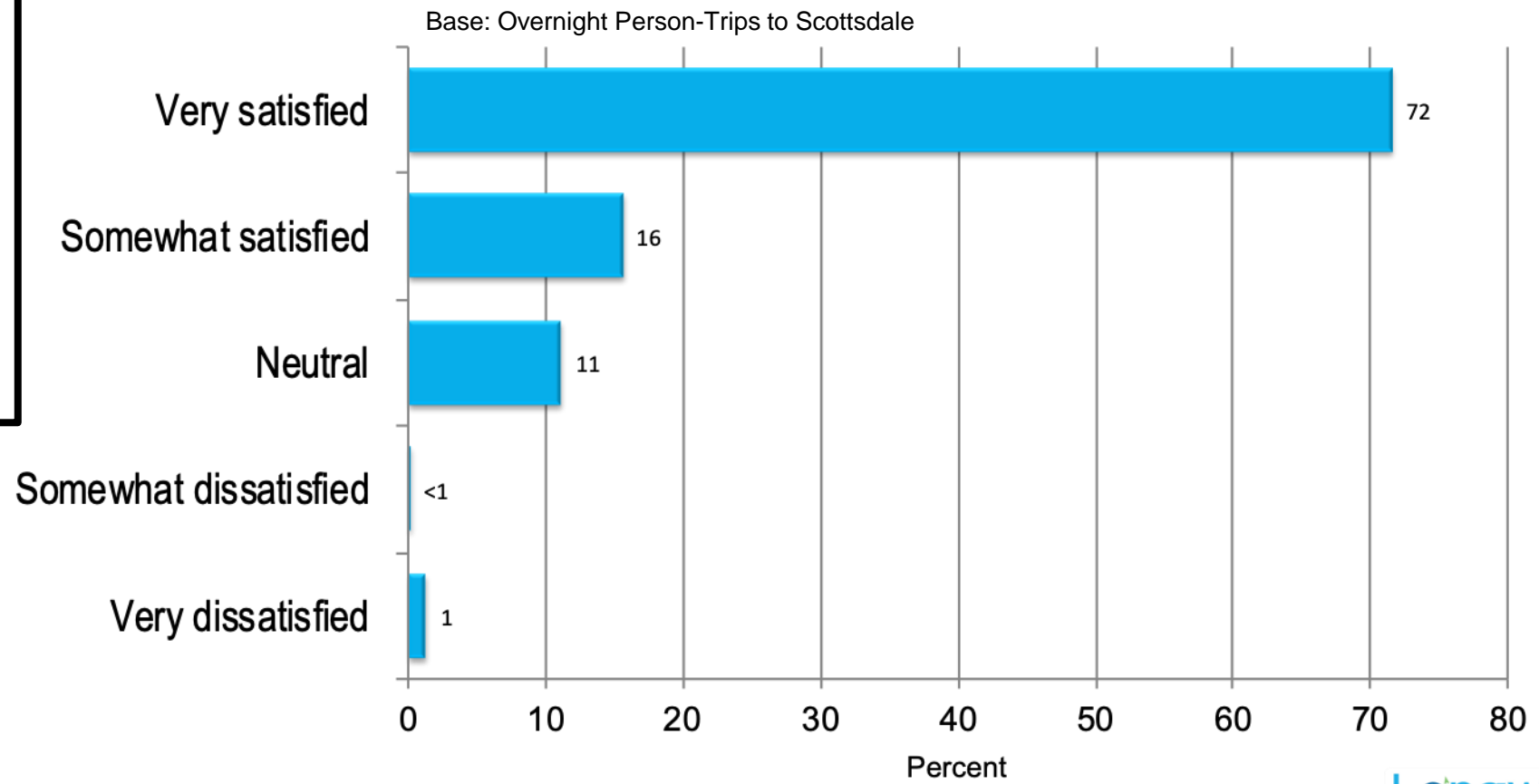
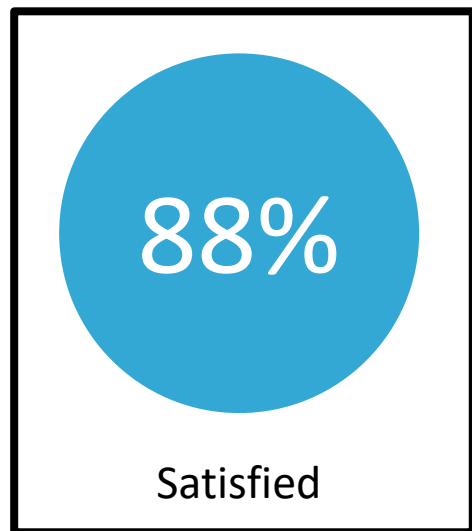
83%

Plan to visit Scottsdale again

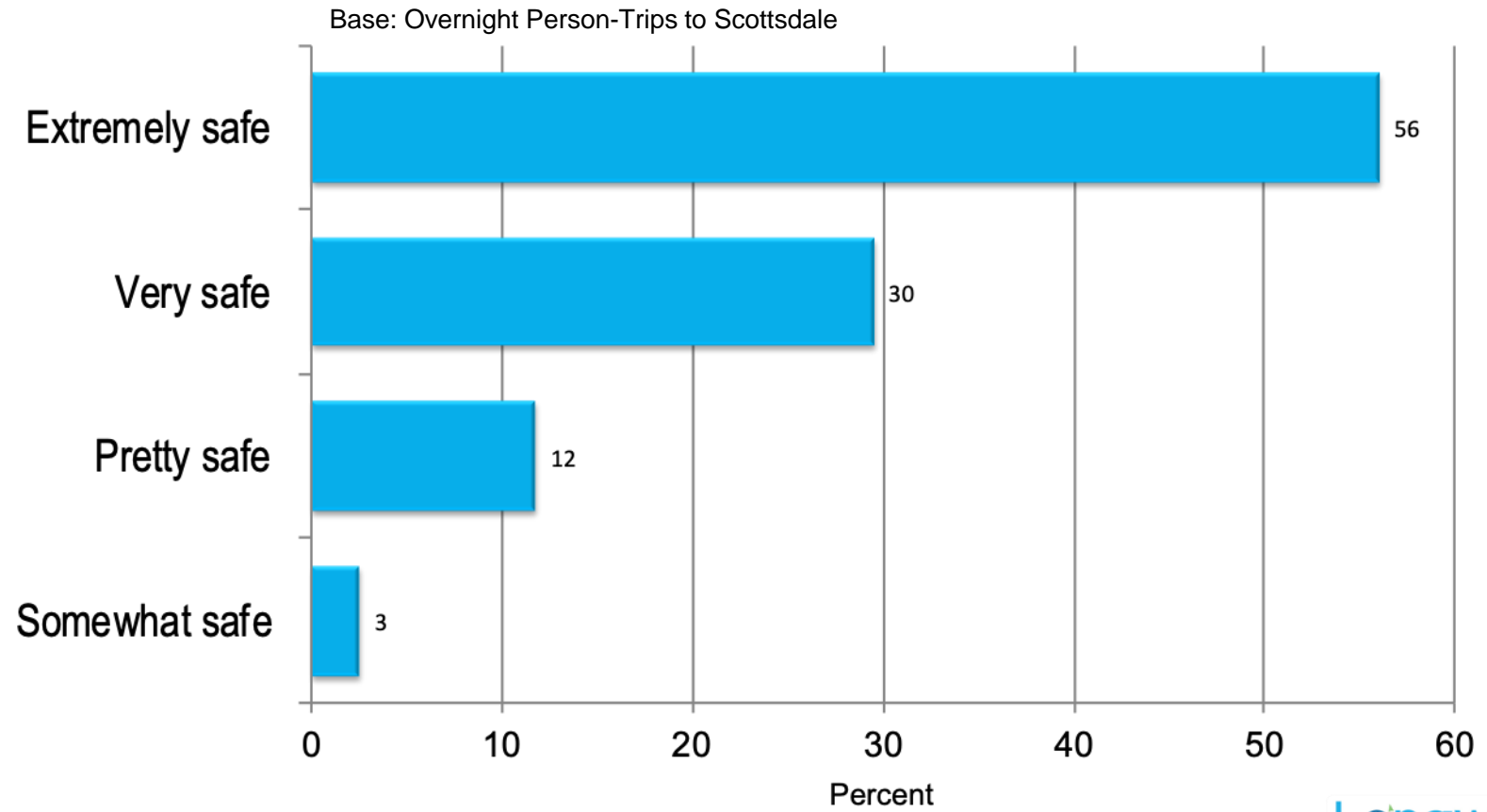
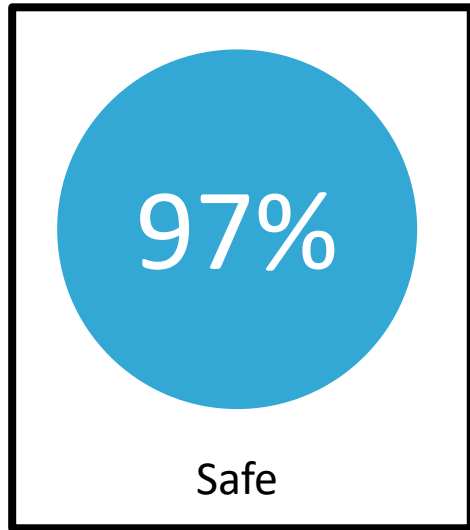
# Overall Satisfaction with Scottsdale Trip



# Satisfaction: Accommodation/Lodging

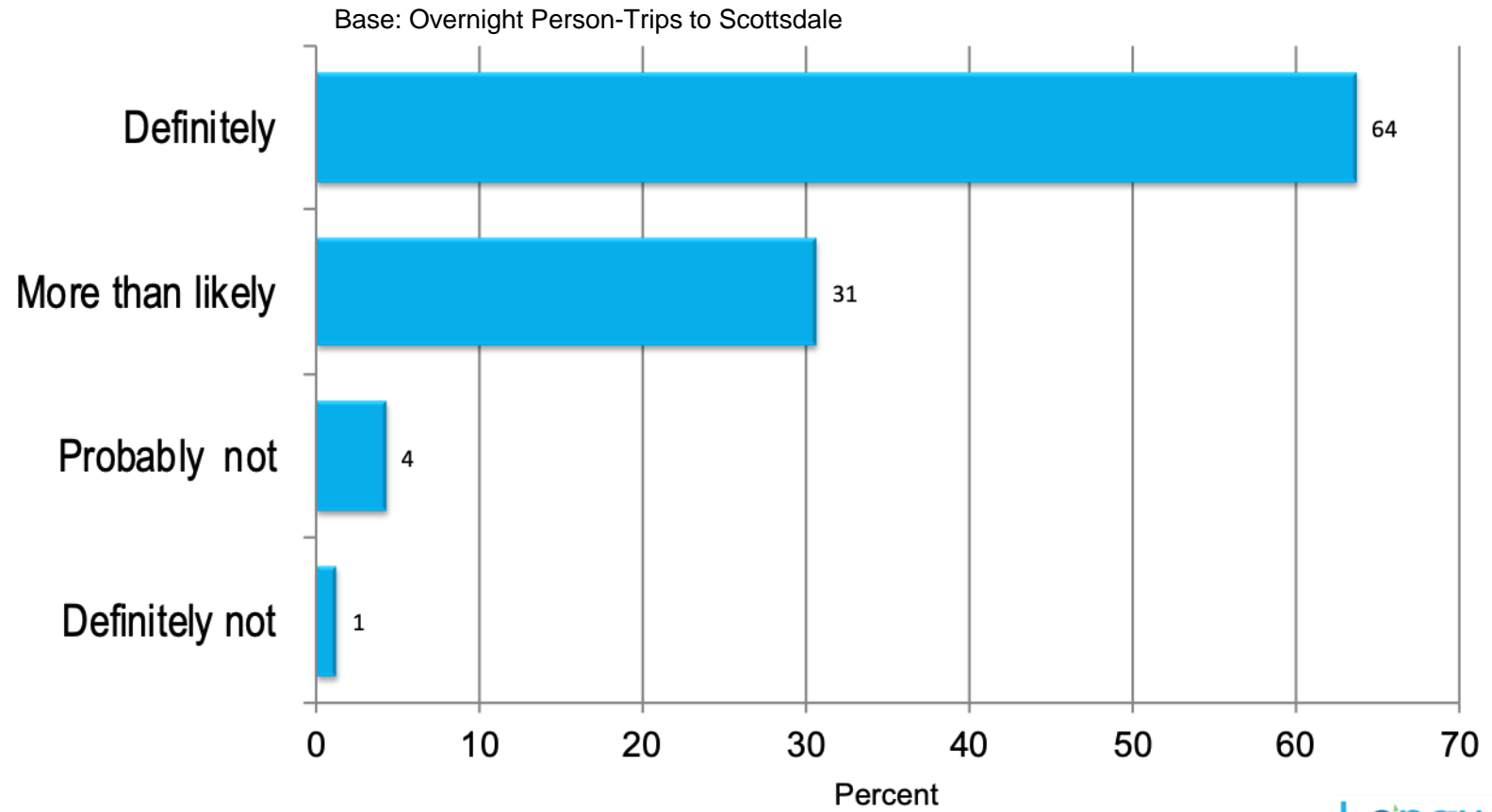


# Perceived Safety



\*No responses for 'not safe'

# Likelihood to Recommend Scottsdale

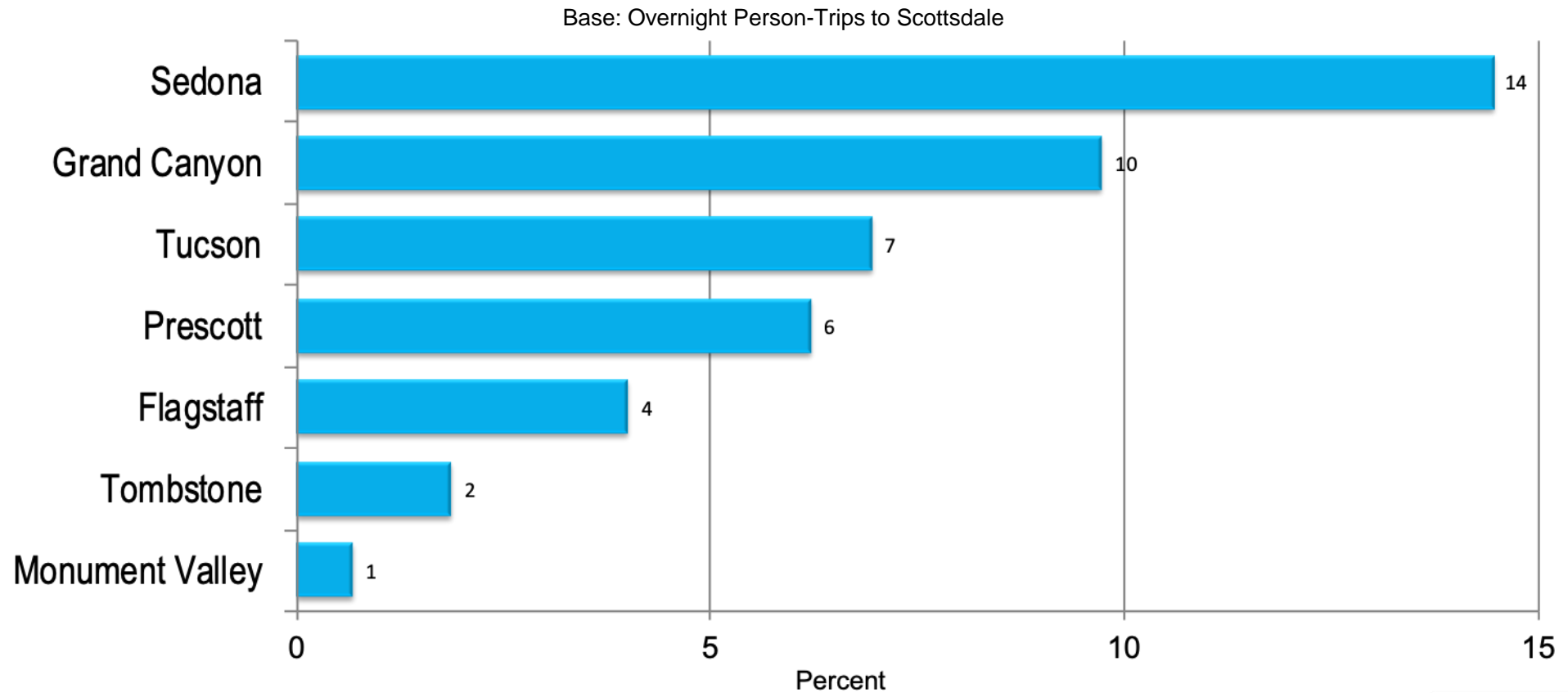


# Primary Destination on Trip

84%

Scottsdale

# Arizona Destinations Visited on Scottsdale Trip



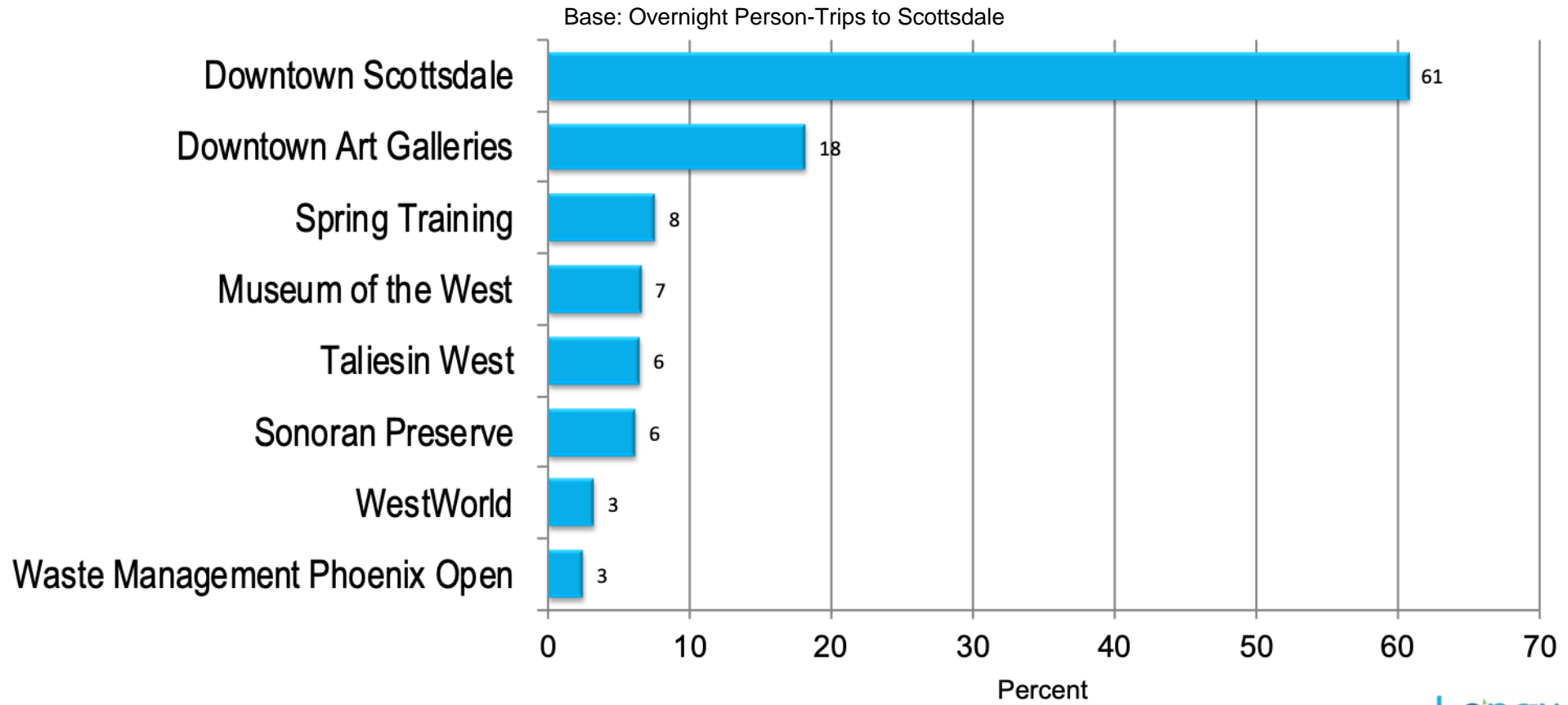
# Ticket Purchasing



19%

Purchased tickets or made reservations for and activity, event or concert before arriving in Scottsdale

# Attractions Visited/Experienced



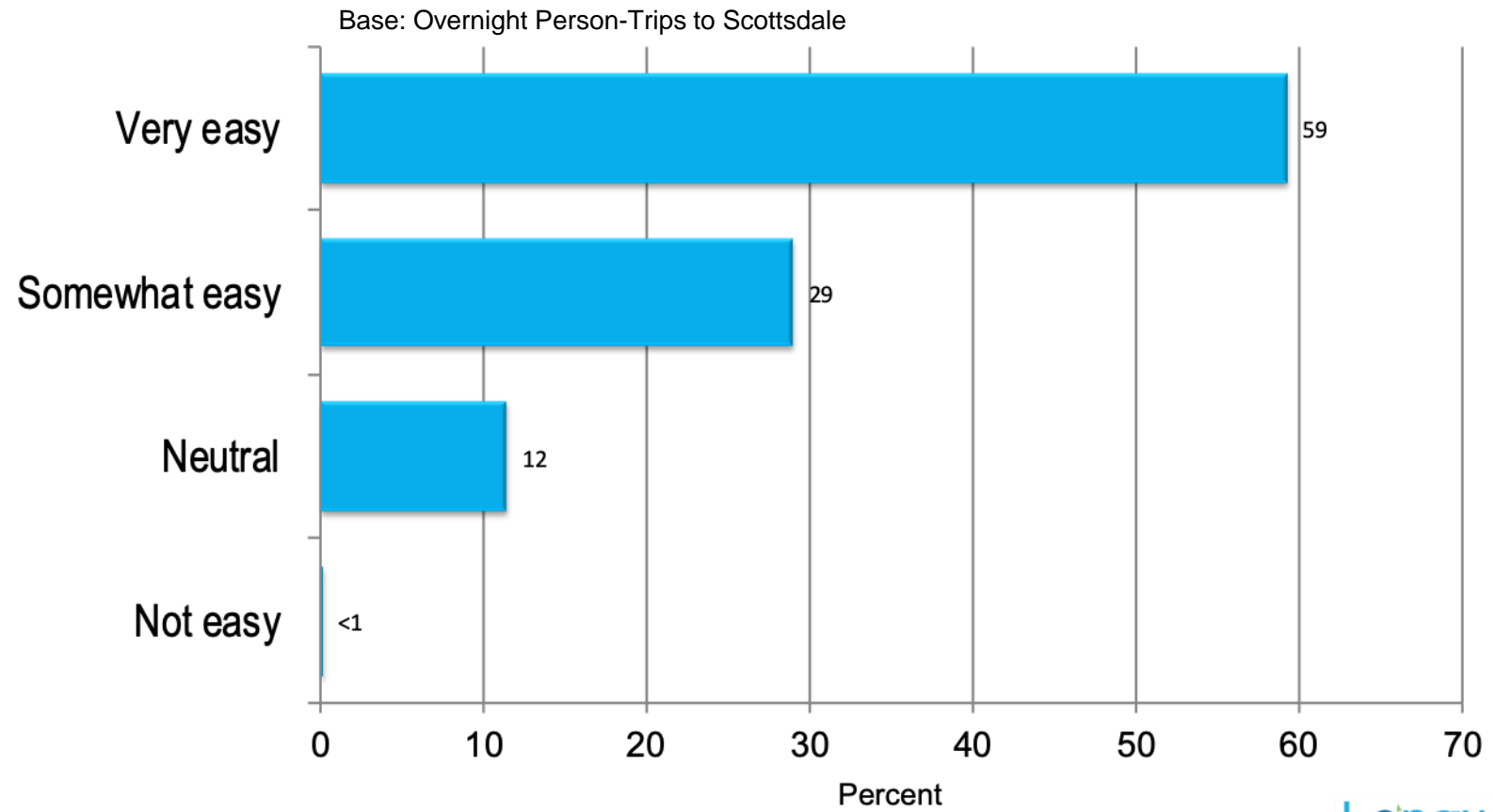
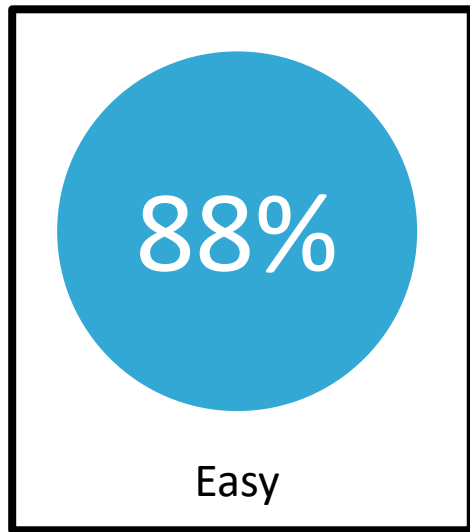
# Old Town Scottsdale



53%

Walked around Old Town Scottsdale  
during trip

# Ease of Navigating Old Town Scottsdale While Walking



\*Caution low sample; no responses for 'not at all easy'

# Information Center/Kiosks

13%

Went to a Visit Scottsdale visitor information center or kiosk during trip

# Questions?

## Anna Blount

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Longwoods International  
[ablount@longwoods-intl.com](mailto:ablount@longwoods-intl.com)



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